



State of Montana Project Management Office

Project Execution and Approval Phase

Planning Worksheet for a Review Meeting Instructions

A format to use to plan an upcoming review meeting, to be SURE it will accomplish what you need it to, whether it's approval from an executive committee for a project portfolio or annual budget; buy-in from everyone who needs to agree to goals of a project; approval of a design; agreement that a product is ready to ship; or finding errors or misunderstandings in project requirements, designs, and/or plans. Use our Review Meeting Planning Worksheet to plan the review methodically. You might be surprised at the new prep work you find that may be critical to the review's success!

This approach can yield some interesting additional work required to get the outcomes you need from the meeting. It works backwards from what you define as the purpose and related "success criteria" for the review meeting, to the work needed to achieve those success criteria, and often from there to pre-meetings and pre-selling that will be essential to achieving the goals of the review.

This table format was originally created for a large initiative that involved long-term R&D planning across a number of independent business units, reporting to a corporate oversight body. Key meetings were required with the oversight body periodically to get approval and budget decisions for the evolving R&D roadmap. The oversight body included very senior representatives from each major business unit.

To achieve the desired outcomes from the Oversight Committee meetings, significant prior work was required: offline reviews for people in each business unit to voice approval up to their Oversight Committee representative, special communication to stakeholders in each business unit, creation of enough early planning information to form the basis of budget approval decisions, etc. Before the team used this planning approach, the Oversight Committee meeting objectives were somewhat vague and obvious. When the team started methodically defining desired outcomes and the requirements to achieve them, they found they had several pieces of very unexpected and non-trivial work they had previously overlooked.

Regardless of whether your projects involve the challenges of such a big organizational structure, the methodical prep approach below will help ensure your review will achieve what you need it to.

Follow the steps on the next page to think through how to prepare for the meeting.

The worksheet also serves as a communication tool to others. It can be used as a summary documentation of the meeting, and as a communication tool to other involved parties.

1. Decide the overall purpose of the review.
 - Is it to get approval of something?
 - Brief a group of people on an early version of a document or other deliverable and find out if there are any major objections?
 - Get buy-in to progress made so far or buy-in that the team is on track?
 - Get a thorough, collective review of something and identify issues?
 - Result in specific actions or decisions you want from someone at the meeting?
2. **Based on the purpose, think further about what success would look like.** Often a first stab at the purpose statement above can be pretty ho-hum, vague, or obvious. If so, it may not generate new insight into how to prepare. Describing what success looks like can highlight ideas and requirements you might not see otherwise. (See examples in the table on the next page.)
3. **Determine any pre-review coordination** that will be needed to achieve the results. For instance, are there key people who must vet things before a particular senior person will give the OK you want to receive at the meeting?
4. **Then determine what materials will be needed.** This includes anything needed at the meeting itself, anything that must be reviewed prior to the meeting, and/or anything needed for any pre-meeting coordination or “selling” you uncover.
5. **Articulate any review questions** you can use to focus the attention of those reviewing materials prior to the meeting or those involved in pre-review selling.
6. **Identify the materials and pre-meeting coordination tasks/actions** needed to get from this point to the review meeting, and set assignments to ensure it will get done in time.
7. **Publish the meeting objectives** to communicate the goals to those involved in the pre-meeting work, to put it all in context. Publish the objectives along with the original meeting notice, to set the stage and expectations for all attendees.

Administrative Information

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